

# Financial Profile

## Achieving Your Real Estate & Financial Goals !

Name \_\_\_\_\_ Social Security # \_\_\_\_\_ D.O.B. \_\_\_\_\_

Name \_\_\_\_\_ Social Security # \_\_\_\_\_ D.O.B. \_\_\_\_\_

Address \_\_\_\_\_ # of Yrs: \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

*\* If Less than 2 yrs at current address, Please provide last address in additional comment box.*

Phone # Home \_\_\_\_\_ Bus. \_\_\_\_\_ Fax \_\_\_\_\_

E-mail \_\_\_\_\_

**Employment:** (If either applicant has worked less than two years at the current employer, please indicate prior employer in additional comments section.)

Applicant's Employer: \_\_\_\_\_

Position: \_\_\_\_\_ Years: \_\_\_\_\_ Years in line of work: \_\_\_\_\_

Co-Applicant's Employer: \_\_\_\_\_

Position: \_\_\_\_\_ Years: \_\_\_\_\_ Years in line of work: \_\_\_\_\_

If self-employed, indicate type of business, how long in business and in this line of work: \_\_\_\_\_

### Gross Annual Income

Borrower \$ \_\_\_\_\_

Co-Borrower \$ \_\_\_\_\_

Other\* \$ \_\_\_\_\_

**Total** \$ \_\_\_\_\_

*\*Rental Income, Child Support, Alimony, etc.*

### Financial Assets

Checking \$ \_\_\_\_\_

Saving \$ \_\_\_\_\_

Stocks/Bonds \$ \_\_\_\_\_

Other (401K, IRA, Etc.) \$ \_\_\_\_\_

Gifts \$ \_\_\_\_\_

**Total** \$ \_\_\_\_\_

Have you ever filed bankruptcy? \_\_\_\_\_

If so, what kind and date of discharge: \_\_\_\_\_

Have you sold your home through a Short Sale Process? \_\_\_\_\_

Have you ever had a Foreclosure? \_\_\_\_\_

### Real Estate

Value

Home \$ \_\_\_\_\_

Investment \$ \_\_\_\_\_

<u>Housing Costs</u>	<u>Monthly</u>	<u>Mortgage Balances</u>	<u>Interest Rate</u>
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Mortgage/Rent Payment \$ \_\_\_\_\_ \$ \_\_\_\_\_ \_\_\_\_\_

Taxes & Insurance \$ \_\_\_\_\_

Other Mortgage \$ \_\_\_\_\_ \$ \_\_\_\_\_ \_\_\_\_\_

Other Taxes & Insurance \$ \_\_\_\_\_

**Total** \$ \_\_\_\_\_ \$ \_\_\_\_\_

### Debts

Monthly

Balances

Total Credit Card \$ \_\_\_\_\_ \$ \_\_\_\_\_

Auto Loans \$ \_\_\_\_\_ \$ \_\_\_\_\_

Installment Loans \$ \_\_\_\_\_ \$ \_\_\_\_\_

Other \$ \_\_\_\_\_ \$ \_\_\_\_\_

*(Child Support, Alimony, Etc.)*

**Total** \$ \_\_\_\_\_ \$ \_\_\_\_\_

### **Additional Comments:**

*I authorize the lender/broker to order a consumer credit report for the purposes of this financial profile.*

**Signed:** \_\_\_\_\_

**America's First State Capital Group**

*Real Estate & Financial Advisors*

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